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## APPENDIX B

# HOW TO FIND AND USE COMMUNITY RESOURCES

As conservator, you shoulder a great deal of responsibility. There are important decisions to be made on behalf of another human being: the conservatee. But you are not alone: a number of public and private resources can help you with many aspects of your duties. There are organizations that will deliver meals to a conservatee's home; others will help you evaluate health insurance policies for an elderly conservatee; private case managers can help you assess the conservatee's needs; and some nonprofit organizations will arrange job training for a conservatee with a developmental disability.

The trick is finding the service you need. It would be wonderful if we could hand you a list of phone numbers to call in your community or a list of organizations that exist in every town. But we can't. Resources change—new organizations form, others lose government funding, phone numbers change. An agency that exists in 10 California communities may not exist in 20 others.

**A video is also available** You may arrange with the court or your lawyer to see *With Heart: Understanding Conservatorship*, a videotape that includes information on the matters covered in this appendix. See page vi at the front of this handbook.

**Ask for the local court supplement** Most superior courts have a local supplement to this handbook. These may have additional information about local court requirements. Many of them also have important information about local community resources that may be available to assist you or the conservatee. If you did not receive a local supplement when you received this handbook, check with the court clerk to make sure that you have all of the local materials you need.

To find help, you need to know what resources may exist in your community. For instance, some or all of the following may be available:

- Adult day health care programs
- Adult social day-care programs
- Case management services
- Counseling
- Courses at schools and colleges
- Day programs for people with developmental disabilities
- Emergency response devices
- Homemaker, home health, and personal-care services
- Legal assistance
- Meal services
- Personal contact programs
- Respite care
- Senior centers
- Transportation services
- Work training programs

See Chapter 4, Section 7, for more information about these services and programs.

**Sources of referrals** To find these services, you need to know the types of organizations and individuals that can guide you to them. Key sources of referrals include

- The court investigator for your conservatorship case
- The social work department of your local hospital
- A regional center for people with developmental disabilities
- The referral and information phone line for your Area Agency on Aging
- Your local library's reference section

Start by asking these organizations and individuals for the names and phone numbers of local resources. Then follow through by calling the suggested resources to find out if and how they can help. One phone call will lead to another until eventually you should be able to locate the service you need.

## **1. Brain-Impaired Adults**

### **Family Caregiver Alliance**

The Family Caregiver Alliance assists relatives of people who have suffered a brain-impairing illness or injury after age 18. Brain impairment may be the result of AIDS, a stroke, an auto accident, or some other disease or injury.

This project offers a wealth of help to family members who take care of brain-impaired adults in California. The Family Caregiver Alliance organizes support groups, runs workshops and seminars, makes referrals to legal and financial consultants, helps find in-home aides, and more. It runs a small respite care program that may be able to provide someone to temporarily care for the impaired family member.

Most services are free or on a sliding scale based on income. The phone number is (800) 445-8106.

## 2. Care Facility Licensing and Complaints

There are three California government agencies charged with licensing and regulating care facilities.

### A. Board-and-Care Homes

#### **California Department of Social Services Community Care Licensing Division**

Board-and-care homes and other residential care facilities are licensed by the California Department of Social Services, Community Care Licensing Division. Before you choose a board-and-care home for the conservatee, check with a district office of this agency to see if the home is licensed. You may want to look through the licensing reports on a particular facility to see if it has been cited for licensing violations.

You can also make complaints about a residential care facility to the Community Care Licensing Division. If you believe that the facility is overcrowded, that residents aren't being served enough food, that they are being mistreated or their personal rights are being violated, or that the facility is unsafe, you should report these problems to a district office of this agency.

Call the Community Care Licensing Division in Sacramento at (916) 229-4500 to get the phone number and address of the division's district office nearest you.

### B. Life-Care Facilities

#### **California Department of Social Services Continuing Care Contracts Program**

The Department of Social Services, Continuing Care Contracts Program, certifies life-care (continuing-care) facilities. Before you enter into a contract for life care for the conservatee, check with this office to find out if the facility is certified. This agency also can give you information about the facility's financial reports. Since a contract with a continuing-care facility is for care in the future, the facility must be financially sound to be able to fulfill its promise of future care.

Call the Continuing Care Contracts Program in Sacramento at (916) 657-2592 to check on a continuing-care facility.

## **C. Nursing Homes**

### **California Department of Health Services Licensing and Certification Division**

Intermediate-care and skilled-nursing facilities are licensed by the California Department of Health Services, Licensing and Certification Division. This agency also oversees acute-care hospitals, chemical dependency recovery facilities, dialysis clinics, home health agencies, and many other health care facilities.

District offices of this agency can tell you whether a facility is licensed, and you can ask to see licensing reports that have been filed on a particular facility. If the facility has been cited for licensing violations, it will be mentioned in the licensing report. You can also make complaints about these facilities to this agency.

Call the Licensing and Certification Division in Sacramento at (916) 445-2070 to find out the phone number for the district office nearest you.

## **D. Long-Term Care Ombudsman Program**

The Long-Term Care Ombudsman Program is designed to protect residents of board-and-care homes, nursing homes, and other long-term residential care facilities. In 33 regions throughout the state, local ombudsmen advocate for the rights of long-term care facility residents, and they respond to and investigate complaints of abuse of residents. The ombudsman programs serve all residents of long-term care facilities, not just elderly residents.

Call the Office of the State Long-Term Care Ombudsman at (800) 231-4024 to get the phone number of your local ombudsman program.

# **3. Conservatorship Case Management**

Conservatorship case managers offer a wide range of services.

- They help assess the conservatee's needs and develop a plan for meeting those needs.
- They arrange services for the conservatee.
- They help you develop your Plan of Conservatorship.

- They coordinate the services of the various agencies and individuals helping the conservatee.
- They keep track of the conservatee's status to see if changes are needed in the conservatee's care.
- They can serve as conservators.

There are private case managers, as well as nonprofit agencies that provide case management services. The Area Agency on Aging may be able to refer you to a case manager, a regional center can refer you to a case manager for a limited conservatee, or you can ask the social work department of a local hospital for a recommendation. Another way to find a case manager is by asking friends, business associates, or family members for a recommendation.

## **4. Developmentally Disabled Conservatees**

### **Regional Centers and California Department of Developmental Services**

Regional centers are nonprofit corporations that have contracts with the California Department of Developmental Services to serve people with developmental disabilities. Regional centers provide some services directly, and they must help you arrange for other services needed by a developmentally disabled conservatee. Services that the regional center must arrange or provide include

- Diagnosis, evaluation, and treatment
- Personal care, day care, and special living arrangements
- Physical and occupational therapy
- Job training and education
- Information about employment opportunities in sheltered settings
- Services to help people with developmental disabilities work in the general community
- Mental health services
- Recreation

- Individual and family counseling
- Protective services
- Information and referral services
- Transportation to and from services
- Respite care
- Advocacy to help people with developmental disabilities get and keep government benefits

If you are conservator for a person with a developmental disability, call the regional center for your community.

<b>REGIONAL CENTER</b>	<b>COUNTIES SERVED</b>	<b>PHONE</b>
Alta California Regional Center	Alpine, Colusa, El Dorado, Nevada, Placer, Sacramento, Sierra, Sutter, Yolo, Yuba	(916) 978-6400
Central Valley Regional Center	Fresno, Kings, Madera, Mariposa, Merced, Tulare	(559) 276-4300
Eastern Los Angeles Regional Center	Los Angeles: Alhambra, East Los Angeles, Northeast, Whittier	(626) 299-4700
Far Northern Regional Center	Butte, Glenn, Lassen, Modoc, Plumas, Shasta, Siskiyou, Tehama, Trinity	(530) 222-4791
Frank D. Lanterman Regional Center	Los Angeles: Central, Glendale, Hollywood-Wilshire, Pasadena	(213) 222-4791
Golden Gate Regional Center	Marin, San Francisco, San Mateo	(415) 546-9222
Harbor Regional Center	Los Angeles: Bellflower, Harbor, Long Beach, Torrance	(310) 540-1711
Inland Regional Center	Riverside, San Bernardino	(919) 890-3000
Kern Regional Center	Kern, Inyo, Mono	(661) 327-8531
North Bay Regional Center	Napa, Solano, Sonoma	(707) 256-1100
North Los Angeles County Regional Center	Los Angeles: East Valley, San Fernando, West Valley	(818) 778-1900
Redwood Coast Regional Center	Del Norte, Humboldt, Mendocino, Lake	(707) 445-0893
Regional Center of Orange County	Orange	(714) 685-5555
Regional Center of the East Bay	Alameda, Contra Costa	(510) 383-1200
San Andreas Regional Center	Monterey, San Benito, Santa Clara, Santa Cruz	(408) 374-9960
San Diego Regional Center	Imperial, San Diego	(858) 576-2996



San Gabriel/Pomona Regional Center	Los Angeles: El Monte, Glendora, Monrovia, Pomona	(919) 620-7722
South Central Los Angeles Regional Center	Los Angeles: Compton, San Antonio, South, Southeast, Southwest	(213) 763-7800
Tri-Counties Regional Center	San Luis Obispo, Santa Barbara, Ventura	(805) 962-7881
Valley Mountain Regional Center	Amador, Calaveras, San Joaquin, Stanislaus, Tuolumne	(209) 473-0951
Westside Regional Center	Los Angeles: Inglewood, Santa Monica-West	(310) 258-4000

## 5. Elderly Conservatees

The following agencies will help you, or will refer you to others who will help you, care for an elderly person.

### A. Area Agencies on Aging (AAAs)

Area Agencies on Aging (AAAs) serve Californians who are 60 or older. Each of the 33 AAAs sponsors an information and referral phone service that guides callers to existing resources. Your local AAA is an excellent place to start your search for community resources.

AAAs can refer you to a wide variety of programs: home-delivered meals, dining rooms that serve meals, transportation services, health screening programs, adult day health care programs, adult day-care centers, senior centers, Alzheimer's centers, legal assistance, patient advocates, in-home aides, and more. These resources vary widely from one community to another.

To find the phone number of your local AAA, look in the Yellow Pages under Senior Citizens, or call the Department of Aging in Sacramento at (916) 322-3887.

## **B. Health Insurance Counseling and Advocacy Program (HICAP)**

Health Insurance Counseling and Advocacy Programs (HICAPs) offer counseling on health insurance for elderly people. HICAP volunteers explain Medicare and Medi-Cal, and they will help you compare private health insurance plans. HICAP also offers help filling out health insurance claim forms and resolving disputes over health insurance claims and coverage.

To reach your local HICAP, call (800) 434-0222.

## **C. Long-Term Care Ombudsman Program**

See Section 2(D) earlier in this appendix.

# **6. Health Care**

The following agencies, organizations, and other resources will help you with health care questions.

## **A. Health Care Facility Licensing**

The Licensing and Certification Division of the California Department of Health Services certifies home health services, dialysis clinics, acute care hospitals, and many other health care facilities as well as nursing homes.

See Section 2 earlier in this appendix for more information.

## **B. Health Insurance Counseling and Advocacy Program (HICAP)**

See Section 5(B) earlier in this appendix for more information about this California Department of Aging program. It offers health insurance counseling to elderly Californians.

## **C. Health Information Organizations**

Chapter 4, Section 3(A), contains a list of health information organizations. Many of these groups have toll-free phone lines that provide information about a particular disease such as Alzheimer's or cancer. These organizations may be able to send you literature about the disease, help you find a local support group, and direct you to appropriate services and resources.

## **D. Medicare**

Toll-free phone lines provide information about Original Medicare Part B claims; see Appendix A, "Guide to Medicare, Medi-Cal, and Other Health Insurance," and Section 1(B) earlier in this appendix. You can call these numbers to check on a particular Original Medicare Part B claim, to find out which services are covered by Part B, and to get the names of health care providers who accept Medicare benefits as full payment for their services.

From southern California, call (800) 848-7713. From northern California, call (800) 675-2266.

# **7. Legal Assistance**

When you need a lawyer, check with friends, business associates, your tax advisor, or family members for recommendations. Finding a lawyer through a satisfied client is an excellent way to get legal help. Try to find a lawyer experienced in handling conservatorships. One way to do that is to ask the lawyer whether he or she accepts court appointments to represent conservatees. Courts in the larger counties have probate volunteer panels of lawyers for this purpose. Ask the lawyer if he or she is a member of the panel in your county. That is excellent conservatorship experience. Many lawyers who regularly practice in the probate court handling decedent's estates do not necessarily have experience in conservatorship matters.

You can also use a lawyer referral service that has been certified by the State Bar of California. These services will refer you to a lawyer who specializes in a particular area of law. In most instances, there will be a small fee for a half-hour consultation with the lawyer. If you decide to hire the lawyer beyond that consultation, you will be charged the lawyer's normal fees for additional work, subject to the court's supervision and prior approval if the fee is going to be paid from the conservatorship estate.

Look in the Yellow Pages under Attorney Referral Services. Call only services that advertise that they are certified by the State Bar. When you call, let the service know what kind of legal assistance you need—for example, help with a conservatorship, a real estate matter, or a contract.

For people with extremely low incomes, there are free legal services programs throughout the state. Look in the white pages of your phone directory under Legal Aid. Free legal services programs will often handle only certain types of legal problems.

Elderly Californians are served by a statewide program of free legal information and advice programs. The local Area Agency on Aging or a senior center can refer you to the closest senior legal assistance program.

## **8. Social Security**

Call the toll-free Social Security office phone line to check on the conservatee's eligibility for retirement, SSI, disability, or Medicare benefits. You may also want to contact the Social Security Administration to have the conservatee's benefit checks deposited directly into the conservatorship account, or to have benefit checks made out to the conservator. Social Security office staff will answer questions and send you forms and literature.

The toll-free Social Security Administration phone number is (800) 772-1213.